

## Activating Your Program's Strategy and Evaluation

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## Today's Session

- Purpose
  - We'll focus on a technique that school leaders can utilize to bring focus to the initiatives within their district or campus.
- What We'll Cover
  - A 9-step model that will aid in making your strategy and evaluation efforts more effective

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## Activities

- Introductions: in person and online
- Learning a framework for linking what you want to do with what you can do
- Coach you in building your own plan.

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## Agenda

- Part 1
  - Introductions
  - Context of today's techniques in comparison to large, organizational strategic planning
  - Rationale for focusing on return-based strategy
  - Step-by-step overview of the framework
- Part 2
  - Practice and Coaching
  - Review of plans
  - Conclusions and Evaluation

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## Introductions

- In Person
  - Name
  - Organization
- Online
  - <http://bit.ly/castlequestion>

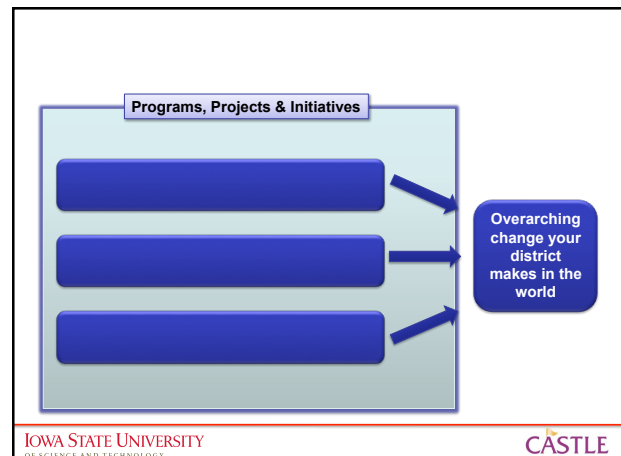
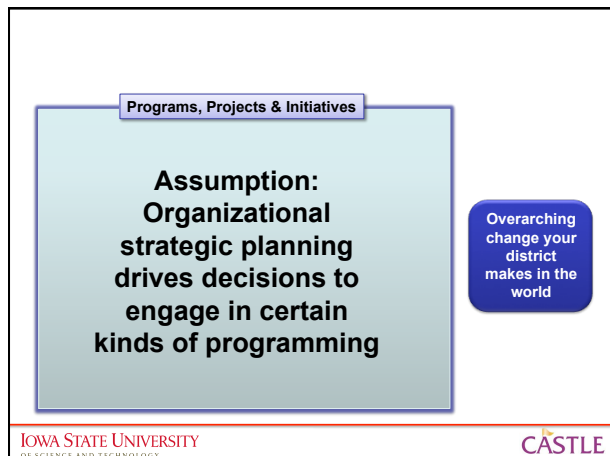
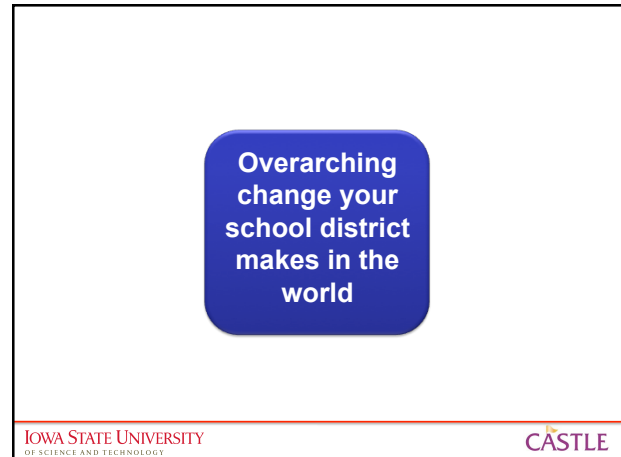
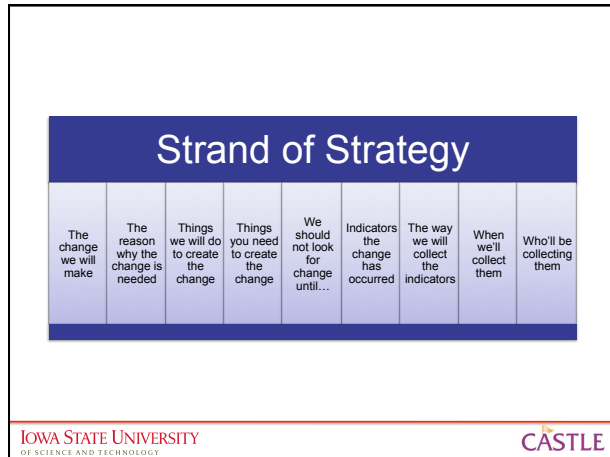
## Volunteers

- We need
  - 3 note takers on a Google doc
    - Link is on the workshop wiki
  - Twitterers
    - Use the hashtag #techleader
    - My twitter ID is @jnash
    - Follow along via the link in the chat window

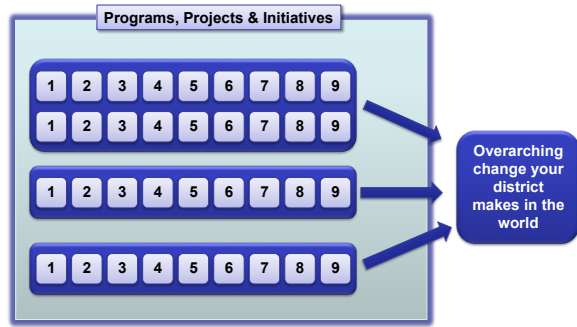
## “R” in ROI

## To Optimize Your Return

- One should think in terms of “change” and not in terms of “do”
  - Identifying change
  - Implementing for change
  - Confirming change
- The notion of “balance” in planning programs.
- Planning within a “strand” is important



## Strands of strategy



## Rationale

- The more concrete and verifiable you are able to articulate your program; the more likely you are to be able to
  - adjust it when things go askew
  - indicate to others whether your program is working

## Process outcomes:

## Define realistic expectations for results

**Identify beneficiaries**

**Design programming to meet  
student needs**

**Supports your needs to  
monitor progress using  
appropriate indicators**

**Communicate to others what  
your programmatic  
expectations are**

**Invite collaboration in  
and constructive  
criticism of your plans**

**Today...**

**Try**

- Strategy and evaluation are "wicked problems"
- One must try to solve the problem in order to understand it.
- One must share their experience to develop.

**One should think in  
terms of "change" and  
not in terms of "do"**

Identifying change  
Implementing for change  
Confirming change

## The notion of “balance” in planning programs.

## Why planning within a “strand” is important

## Step 1 of a “strand”

State the **change you will make** via your project or initiative.

Change statements indicating a **movement from A to B.**

They indicate a **change** or an **improvement...**

...or an **increase** or **decrease.**



## The Change We Will Make

- Express the exact change you intend to make.
- Be SMART
  - Specific
  - Measurable
  - Attainable
  - Realistic
  - Time-based

## Change statements are SMART

Specific Measurable Attainable Realistic Time-based

## Change statements are SMART

Specific Measurable Attainable Realistic Time-based



**Not vague. Others “get it” immediately**  
**No “and.” No “or.” No “also.”**  
**No “so that...”**

## Change statements are SMART

Specific Measurable Attainable Realistic Time-based



**Worded in a way that you can sense an increase or decrease is sought.**  
**Expressed as a change!**

**Change statements are SMART**

Specific	Measurable	Attainable	Realistic	Time-based
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↑

**It's something you can really attain.  
Feasible within a fiscal year or less.**

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**Change statements are SMART**

Specific	Measurable	Attainable	Realistic	Time-based
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**It's realistic given your mandate,  
reach and resources**

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**Change statements are SMART**

Specific	Measurable	Attainable	Realistic	Time-based
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**You know the time period needed to  
reach the goal.  
Will not drag on forever.**

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**Let's practice**

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**Help troubleshoot this change statement**

We will offer 10 workshops for our teachers

**Here's the next one**

**Turn to your neighbor and troubleshoot this change statement**

Conduct a parent outreach project to create a positive school image brand and highlight positive feelings

## Example

### Step 1: The change we will make

By the end of 2010-2011 school year, 100% of the instructional units designed by the Technology Advisory Group will meet the quality criteria of the Digital Learning Design Rubric.

## Step 2 of a “strand”

State the **the reason why**  
the change is needed.

## 2. The Reason Why Change is Needed

- Fill in why you believe a specific change is important.
- Why do this?
  - You have to know at all times why you are engaging in the work you’re doing
  - Create support, internally and externally, for the projects in the organization
  - To ensure the work is consistent with your mission

## Example of 1 & 2 in Context

Step 1: The change we will make	Step 2: The reason why the change is needed
By the end of 2010-2011 school year, 100% of the instructional units designed by the Technology Advisory Group will meet the quality criteria of the Digital Learning Design Rubric.	Currently, quality units and lessons that lacking. We need to produce more sample units that promote 21st century thinking through the use of digital and other tools.  Developing early adopters and teacher leaders will pave way for large scale change.

## Step 3 of a “strand”

State the **the things you will do**  
to create the change.

### 3. Things You Will Do

- Most people start here.
- Indicating what you will do is important, but it should not be the first step in a plan.
- Make sure you have “balance” in your activities

### 3. Things You Will Do

**Turn to your neighbor:**

**Why is it risky to begin any plan with what you'll do rather than what you'll change?**

### 3. Things You Will Do

#### Step 3: Things We Will Do

Establish Tech Advisory PD  
schedule and content  
Convene stakeholders on  
what professional  
development should look like

Clearly define success  
criteria

### Step 4 of a “strand”

**State the *the things you need* to create the change.**

#### 4. Things We Need to Make the Change

- Make fair estimates of staff and supplies needed for the activities described in column three.

##### Step 4: The things we need to make the change

Technical support (Digital-age  
learning coach)

Sample video units and/or written  
units

Collaboration opportunities

Venue for meetings

Etc.

The concept of  
balance applies  
here as well!

All of these must  
be in service to  
“the change”

#### Step 5 of a “strand”

We will should not look  
for change **until...**

#### Step 5 of a “strand”

**Ask yourself:**

**What data is needed at what  
level to know you’re ready to  
say “let’s see if this worked.”?**

#### Step 6 of a “strand”

**Indicators** that the  
change has occurred

## Step 6 of a “strand”

“what do I need to see or hear to know the change has occurred?”

## Indicators of Success

- Documented evidence
- Something you need to **see** or **hear** to convince others a goal has been reached



## Indicator Examples

### Step 6: Indicators the change has occurred

Increased percent of units meeting the preset quality criteria.

## Step 7 of a “strand”

The way we will **collect the indicators**

### How you'll collect indicators

- Survey
- Focus Group
- An agreed-upon metric
  - Counts
  - Rates
  - Existence of something new



### Step 7 of a “strand”

- What method will you use?
  - Face to face survey
  - Paper based survey
  - Web based survey
  - Telephone survey
  - Face to face interview
  - Telephone interview
  - Focus groups
  - Document review
  - Observations
  - Activity Logs/Skill Sheets
  - Tests
- What sources will you draw from?
  - Participants
  - Parents or relatives of participants
  - Others impacted (specify as many as necessary)

### Step 8 of a “strand”

**When we'll collect  
our indicators**

### Step 8 of a “strand”

- How soon do you need information?
- To what extent are your outcomes “phased.”
- Do you have a “ladder” of outcomes?
- What can you collect on your own, and what will you need help with?

## Step 9 of a “strand”

Who will collect the indicators?

## Step 9 of a “strand”

Who will collect the indicators?

## Strand of Strategy

The change we will make	The reason why the change is needed	Things we will do to create the change	Things you need to create the change	We should not look for change until...	Indicators the change has occurred	The way we will collect the indicators	When we'll collect them	Who'll be collecting them
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Questions? Comments?



## Template

<http://bit.ly/saitemplate2010>

## Tips for Feedback

- Is the change statement SMART?
- Is the change statement easily understood?
- Is the rationale sound? Believable?
- Are there enough activities? Too many?
- Enough resources?
- Will the indicator(s) definitely tell you the change stated in column 1 has taken place

- Like
- Like
- Wish

I like that \_\_\_\_\_.

I like that \_\_\_\_\_.

I wish that \_\_\_\_\_.



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John's blog on leadership and reform  
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